



## ANNUAL PLAN SAMPLE ANNUAL PLAN

- A. **PARTIES:** This Annual Plan is part of the Cooperating Association Agreement between California Department of Parks and Recreation (State Parks) and the \_\_\_\_\_ (Partner Name), dated \_\_\_\_\_. All terms and conditions of the Cooperating Association Agreement are hereby incorporated by reference.
- B. **YEAR:** The Park and the Partner mutually agree to undertake certain projects and programs (Identified Projects) in the year starting July 1, \_\_\_\_\_, and ending June 30, \_\_\_\_\_.
- C. **IDENTIFIED PROJECTS, ROLES and SCHEDULE:** Identified Projects to be undertaken are described below, along with the respective roles of the Park and the Partner, and a schedule for completion (include narrative, as appropriate):

Identified Project	Park Role	Association Role	Schedule
A			Start: Complete:
B			Start: Complete:
C			Start: Complete:

- D. **AUTHORITIES:** The CAL has consulted with the District Superintendent regarding the authorities to carry out the Identified Projects described above, and to accept the donated funds, goods and services described in Item E. The CAL has confirmed that the following authorities are appropriate for these activities:

***[See Cooperating Association Agreement authorities]***

- E. **BUDGET:** The estimated cost to carry out the Identified Projects in this Annual Plan is \$\_\_\_\_\_. Budget breakdown and funding sources are described below:

Identified Project	Estimated Cost	CASH Funding Amount & Source	VALUE OF IN-KIND GOODS AND SERVICES
A	\$_____	\$_____ [cite funding source] \$_____	N/A
B	\$_____	\$_____ Partner – <b>To be raised</b>	\$_____ -- [Ex: 120 volunteer hours]
C	\$_____	\$_____ Partner – <b>To be raised</b>	\$_____ – [Ex: Equipment rental donation]
TOTALS	\$_____	\$_____	\$_____

- F. **FUNDRAISING:** This Annual Plan agrees with the Partner's efforts to raise \$\_\_\_\_\_ and to provide in-kind goods and services valued at \$\_\_\_\_\_ to support the Identified Projects described above. The Partner agrees to comply with all relevant fundraising-related terms, conditions and processes contained in the Cooperating Association



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Agreement, in the Donor and Sponsor Recognition Guidelines (2007), and all legal requirements.

Identified Project	Fundraising Goal
A	N/A
B	\$
C	\$

A. The Partner will raise funds by... [Ex: seeking \$16,000 from "Save the \_\_\_\_\_ Foundation" and requesting 10 Board Members each contribute \$800 for a total of \$8,000.]

B. The Partner will review donors and donations by... [Ex: vetting prospective donors for any potential conflict of interest].

C. Donors will be recognized in the following way: [Ex: Letters of appreciation, signed by association leadership and Park Superintendent, will be sent to all donors.]

G. **PARK PROPERTY OR RESOURCES:** If State Parks will provide state property or other resources (volunteers, staff time, etc.) for the Partner's use at any time during the term of the Cooperating Association Agreement, list those resources here:

H. **MODIFICATIONS:** Proposed deviations from the signed Annual Plan require the concurrence of both Parties in writing. Modifications will be subject to all terms and conditions of the Cooperating Association Agreement.

I. **ADDITIONAL PROVISIONS:** [as identified by the Park and the Partner]

### J. SIGNATURES

California State Parks

By: \_\_\_\_\_

Name: \_\_\_\_\_  
Title: District Superintendent

Date

Partner

By: \_\_\_\_\_

Name: \_\_\_\_\_  
Title:

Date